



Departmental Quarterly Performance Report

Department Name: PROPERTY APPRAISAL

**Reporting Period:
Fiscal Year 2002 – 2003
3rd Quarter**

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MAJOR PERFORMANCE INITIATIVES

Describe Key Initiatives and Status

Check all that apply

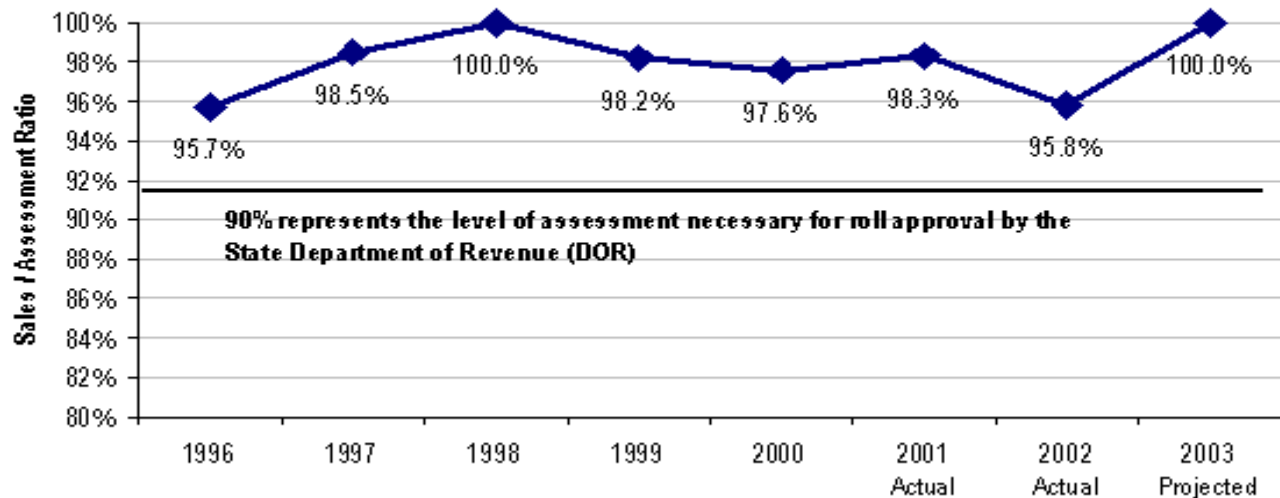
County Mgr. Priority (Circle One): *People* *Service* *Technology* *(Fiscal Responsibility)*

Submission of certified tax roll by July 1 to the State of Florida Department of Revenue (DOR) for approval.

- Complete the Real Estate assessment work cycle by June 15 and ensure that the roll meets each of the Real Estate sales strata standards mandated by DOR.
- Complete the Personal Property Assessment work cycle by June 15.
- Complete the personal and institutional exemption intake and processing cycle by June 15.

☒ *Strategic Plan*
☒ *Business Plan*
☒ *Budgeted Priorities*
☐ *Customer Service*
☐ *ECC Project*
☐ *Workforce Dev.*
☐ *Audit Response*
☐ *Other* _____
(Describe)

Roll Approval Standard



County Mgr. Priority (Circle One): *People* *(Service)* *Technology* *Fiscal Responsibility*

Enhance the Property Appraisal website to ensure quality customer service.

- Provide the ability for property owners to access TRIM notice data.
- Provide comparative sales information on-line.
- Develop an on-line (e-Application) for the exemption process (see EMS initiative)

☒ *Strategic Plan*
☒ *Business Plan*
☒ *Budgeted Priorities*
☒ *Customer Service*
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☐ *Audit Response*
☐ *Other* _____
(Describe)

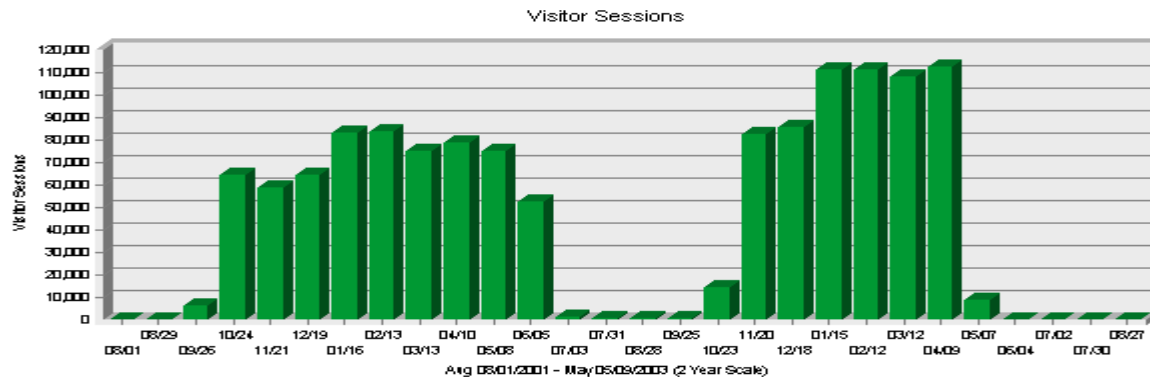
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Property Appraisal Department WEBTRENDS Report

www – PA (InterNet)	3 rd Quarter Report	
Cumulative statistics	08/01/2001- 05/09/2003	
Hits	Entire Site (Successful)	24,948,503
	Average Per Day	38,560
	Home Page	912,227
Page Views	Page Views (Impressions)	4,574,524
	Average Per Day	7,070
	Document Views	4,571,816
Visitor Sessions	Visitor Sessions	1,286,462
	Average Per Day	1,988
	Average Visitor Session Length	0:10:07
	International Visitor Sessions	0%
	Visitor Sessions of Unknown Origin	100%
	Visitor Sessions from United States	0%
Visitors	Unique Visitors	281,768
	Visitors Who Visited Once	156,036
	Visitors Who Visited More Than Once	125,732



Summary of Activity for Report Period	08/01/2001- 05/09/2003	
Average Number of Visitor Sessions per day on Weekdays	2,718	
Average Number of Hits per day on Weekdays	53,843	
Average Number of Visitor Sessions for the entire Weekend	2,287	
Average Number of Hits for the entire Weekend	38,790	
Most Active Day of the Week	Tue	
Least Active Day of the Week	Sat	
Most Active Day Ever	14-Apr-03	
Number of Hits on Most Active Day	121,377	
Least Active Day Ever	October 20, 2001	
Number of Hits on Least Active Day	15	
Most Active Hour of the Day	11:00-11:59	
Least Active Hour of the Day	04:00-04:59	

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<p>County Mgr. Priority (Circle One): People <u>(Service)</u> Technology Fiscal Responsibility</p> <p>Improve customer service and employee workload by revising the exemption filing process.</p> <ul style="list-style-type: none"> Initiate implementation of the consolidated exemption form no later than December 31, 2003. Provide standardized process for submission of exemption applications through a mail-in process, pending results of a 2002 pilot study. 	<p><input checked="" type="checkbox"/> Strategic Plan</p> <p><input checked="" type="checkbox"/> Business Plan</p> <p><input checked="" type="checkbox"/> Budgeted Priorities</p> <p><input checked="" type="checkbox"/> Customer Service</p> <p><input checked="" type="checkbox"/> ECC Project</p> <p><input type="checkbox"/> Workforce Dev.</p> <p><input type="checkbox"/> Audit Response</p> <p><input type="checkbox"/> Other _____</p> <p>(Describe)</p>
<p>County Mgr. Priority (Circle One): People (<u>Service</u>) Technology Fiscal Responsibility</p> <p>Development of a consolidated Personal Property Cut-Out database to reduce the initial response "to taxpayers' request for correction" from the current 60 to 90 days to 45 to 60 days.</p> <ul style="list-style-type: none"> Analysis by eGov was completed but programming is pending a review of the Tax Collector's Cutout process. 	<p><input checked="" type="checkbox"/> Strategic Plan</p> <p><input checked="" type="checkbox"/> Business Plan</p> <p><input checked="" type="checkbox"/> Budgeted Priorities</p> <p><input checked="" type="checkbox"/> Customer Service</p> <p><input checked="" type="checkbox"/> ECC Project</p> <p><input type="checkbox"/> Workforce Dev.</p> <p><input type="checkbox"/> Audit Response</p> <p><input type="checkbox"/> Other _____</p> <p>(Describe)</p>
<p>County Mgr. Priority (Circle One): People Service <u>(Technology)</u> Fiscal Responsibility</p> <p>Computer Aided Mass Appraisal (CAMA) system to improve the Department's Real Estate daily business transactions and database processes. The Selection committee received approval of their vendor choice from the County Manager's Office.</p> <ul style="list-style-type: none"> The Department is in final contract negotiations. We plan to present a contract to the Manager by October. 	<p><input checked="" type="checkbox"/> Strategic Plan</p> <p><input checked="" type="checkbox"/> Business Plan</p> <p><input checked="" type="checkbox"/> Budgeted Priorities</p> <p><input type="checkbox"/> Customer Service</p> <p><input type="checkbox"/> Workforce Dev.</p> <p><input checked="" type="checkbox"/> ECC Project</p> <p><input type="checkbox"/> Audit Response</p> <p><input type="checkbox"/> Other _____</p> <p>(Describe)</p>
<p>County Mgr. Priority (Circle One): People Service <u>(Technology)</u> Fiscal Responsibility</p> <p>Electronic Document Management Services (EDMS) unit developed in the Information Services Division. The main function of the unit will be to ensure the timely exchange of Value Adjustment Board Hearing information according to the Florida Statutes. The secondary function will be to identify and apply the EDMS process to existing procedures within the Department.</p> <ul style="list-style-type: none"> A staff of 4 Property Appraisal Clerks and 2 Property Evaluation Specialists was hired in February 2003. The staff is in training and the initial preparation/scan test for homestead exemption and senior applications. Vendor continued installation and testing of phase 1, monitoring and developing enhancements and reports. Began developing web-based EDMS project productivity tracking application. Phase 2 of the implementation is scheduled for September in time for the new VAB season. The unit is currently scanning Personal Property Tax Returns and the 2003 Exemption applications. 	<p><input checked="" type="checkbox"/> Strategic Plan</p> <p><input checked="" type="checkbox"/> Business Plan</p> <p><input checked="" type="checkbox"/> Budgeted Priorities</p> <p><input checked="" type="checkbox"/> Customer Service</p> <p><input type="checkbox"/> Workforce Dev.</p> <p><input checked="" type="checkbox"/> ECC Project</p> <p><input type="checkbox"/> Audit Response</p> <p><input type="checkbox"/> Other _____</p> <p>(Describe)</p>

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<p>County Mgr. Priority (Circle One): <i>People</i> <i>Service</i> <i>Technology</i> (<u>Fiscal Responsibility</u>)</p> <p>Alternate Level of Assessment project initiated to meet the more stringent roll approval standards set by the Department of Revenue. The AloA is a measure that identifies if sold and unsold properties are assessed equally.</p> <ul style="list-style-type: none"> • Five Real Estate Evaluator 2 positions funded for the express use to analyze and assess commercial properties within Miami-Dade County. • Conducted 2002 re-survey of commercial one and two story offices and retail land uses under 10,000 square feet (approximately 1200 inspections) • Re-assessed approximately 540 fast food restaurants and 2600 one to three story apartment buildings. • According to the Department calculation of the roll approval standards, we met the Department of Revenue's requirements for the 2003-assessment roll approval. 	<p><input checked="" type="checkbox"/> Strategic Plan</p> <p><input checked="" type="checkbox"/> Business Plan</p> <p><input checked="" type="checkbox"/> Budgeted Priorities</p> <p><input type="checkbox"/> Customer Service</p> <p><input type="checkbox"/> Workforce Dev.</p> <p><input type="checkbox"/> ECC Project</p> <p><input type="checkbox"/> Audit Response</p> <p><input type="checkbox"/> Other _____ (Describe)</p>
<p>County Mgr. Priority (Circle One): <i>People</i> <i>Service</i> (<u>Technology</u>) <i>Fiscal Responsibility</i></p> <p>Development of a Real Estate fieldwork tracking application to monitor all field inspections and evaluators' activities. The database will provide individual measured performance results to be used on the performance evaluation. It will be used to identify training needs, produce record of daily field activities, and improve reporting of cycle productivity.</p> <ul style="list-style-type: none"> • Database issues to be resolved with the Real Estate and Commercial districts; data loaded, cleaned, and application demonstrated before implementation. • System implementation is pending final data base requirements from the Real Estate Division. 	<p><input type="checkbox"/> Strategic Plan</p> <p><input checked="" type="checkbox"/> Business Plan</p> <p><input type="checkbox"/> Budgeted Priorities</p> <p><input type="checkbox"/> Customer Service</p> <p><input checked="" type="checkbox"/> Workforce Dev.</p> <p><input checked="" type="checkbox"/> ECC Project</p> <p><input type="checkbox"/> Audit Response</p> <p><input type="checkbox"/> Other _____ (Describe)</p>
<p>County Mgr. Priority (Circle One): <i>People</i> <i>Service</i> (<u>Technology</u>) <i>Fiscal Responsibility</i></p> <p>Digital Camera project is a proposal to research, test and implement digital cameras as a replacement for the existing Polaroid Instant Cameras; ability to integrate with CAMA; and reduce the annual expenditure on film.</p> <ul style="list-style-type: none"> • A focus group created in November 2002 to implement and conduct a pilot project. • Conducted a survey of photo needs for the first two weeks of November. • Submitted equipment specifications to purchase cameras for the pilot. • Purchased initial cameras for the field and the pilot study presently underway. • The pilot study has been completed and deemed successful. The Department has purchased Cameras and assigned them to the staff to be used in the field for the 2004 assessment roll. This project is completed. 	<p><input checked="" type="checkbox"/> Strategic Plan</p> <p><input type="checkbox"/> Business Plan</p> <p><input checked="" type="checkbox"/> Budgeted Priorities</p> <p><input type="checkbox"/> Customer Service</p> <p><input checked="" type="checkbox"/> Workforce Dev.</p> <p><input checked="" type="checkbox"/> ECC Project</p> <p><input type="checkbox"/> Audit Response</p> <p><input type="checkbox"/> Other _____ (Describe)</p>
<p>County Mgr. Priority (Circle One): <i>People</i> (<u>Service</u>) <i>Technology</i> <i>Fiscal Responsibility</i></p> <ul style="list-style-type: none"> • Exemption Management System (EMS) is an efficiency initiative to improve customer service and internal processing of the exemption application. The Department is developing an on-line exemption application (e-App) that will allow the clerical staff to post an application directly to the database system. The e-App will improve service in the following areas: Instant filing and confirmation with an official receipt; minimize paperwork; and reduce the number of receipts mailed. Conducting pilot study as of the 2003 applications. 	<p><input checked="" type="checkbox"/> Strategic Plan</p> <p><input checked="" type="checkbox"/> Business Plan</p> <p><input type="checkbox"/> Budgeted Priorities</p> <p><input checked="" type="checkbox"/> Customer Service</p> <p><input type="checkbox"/> Workforce Dev.</p> <p><input checked="" type="checkbox"/> ECC Project</p> <p><input type="checkbox"/> Audit Response</p> <p><input type="checkbox"/> Other _____ (Describe)</p>

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<ul style="list-style-type: none"> The application has been completed and the pilot study successful. Full implementation is pending the acquisition of needed hardware for the Exemption Division. 	
<p>County Mgr. Priority (Circle One): <i>People</i> <i>Service</i> <i>Technology</i> (<i>Fiscal Responsibility</i>)</p> <p>The Personal Property Independent Audit Project. The firm of Mendola & Associates was awarded the contract to conduct independent audits of selected Personal Property accounts.</p> <ul style="list-style-type: none"> As of July 25, 2003 there are 50 completed audits with a net gain of approximately \$30 million countywide. 	<p><input checked="" type="checkbox"/> <i>Strategic Plan</i></p> <p><input checked="" type="checkbox"/> <i>Business Plan</i></p> <p><input checked="" type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input checked="" type="checkbox"/> <i>ECC Project</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____</p> <p>(Describe)</p>
<p>County Mgr. Priority (Circle One): <i>People</i> <i>Service</i> <i>Technology</i> <i>Fiscal Responsibility</i></p>	<p><input type="checkbox"/> <i>Strategic Plan</i></p> <p><input type="checkbox"/> <i>Business Plan</i></p> <p><input type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input type="checkbox"/> <i>ECC Project</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____</p> <p>(Describe)</p>

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PERSONNEL SUMMARY

A. Filled/Vacancy Report

NUMBER OF FULL-TIME POSITIONS*	Filled as of September 30 of Prior Year	Current Year Budget	Actual Number of Filled and Vacant positions at the end of each quarter							
			Quarter 1		Quarter 2		Quarter 3		Quarter 4	
			Filled	Vacant	Filled	Vacant	Filled	Vacant	Filled	Vacant
	233	258	232	26	247	11	240	18		

* Public Safety Departments should report the sworn versus non-sworn personnel separately and Departments with significant part-time, temporary or seasonal help should report these separately.

Notes:

B. Key Vacancies:

Twelve Property Appraisal Clerks and one Real Estate Change Clerk needed for the processing of data for the tax roll.

Two Income Specialists; positions needed for the Alternate Level of Assessment study and defending assessment values at the Value Adjustment Board.

One Personal Property Evaluator needed to assist in the completion of the personal property assessment cycle by June 15.

One Real Estate Evaluator 2 authorized for the Homestead Exemption Investigation Unit.

One Property Appraisal Supervisor 1 needed for the Commercial District to monitor and manage employees in the processing of assessed values for tax roll.

C. Turnover Issues:

None at this time

D. Skill/Hiring Issues

Lack of qualified White Females applying for open positions.

E. Part-time, Temporary and Seasonal Personnel

(Including the number of temporaries long-term with the Department)

Used Temporary personnel in the Homestead Exemption Division to enable the Department to man the satellite locations required for the exemption application-filing period.

F. Other Issues

A skilled computer technician needed in the Information Services Division to assist in maintaining the over 200 personal computers and peripheral equipment we now have in the Department.

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FINANCIAL SUMMARY

(All Dollars in Thousands)

	PRIOR YEAR Actual	CURRENT FISCAL YEAR						
		Total Annual Budget	Quarter 3		Year-to-date			
			Budget	Actual	Budget	Actual	\$ Variance	% of Annual Budget
Revenues								
General Fund	12,772	13,212	3,303	4,229	**13,212	12,442	770	94%
Reimbursement	1,143							
Budget Adjustment	1,150							
♦								
Total	15,065	13,212	3,303	4,229	**13,212	12,442	770	94%
Expense*								
Personnel	13,803	11,902	2,976	3,834	11,902	10,823	1,079	99.7%
Operating	1,243	1,305	326	387	1,305	1,487	-182	-1.14%
Capital	19	5	1	8	5	132	-127	-3.79%
Total	15,065	13,212	3,303	4,229	**13,212	12,442	770	94.7%

* Expenditures may be reported by activity as contained in your budget or may be reported by category (personnel, operating and capital).

** Does not include the \$2.1 million budget amendment approved by the Board of County Commissioners in July.

Equity in pooled cash (for proprietary funds only)

Fund/ Subfund	Prior Year	Projected at Year-end as of			
		Quarter 1	Quarter 2	Quarter 3	Quarter 4
Total					

Comments:

(Explain variances discuss significant in-kind services, provide status of aged receivables at 30-60-90+ days and those scheduled for write-off, if applicable)

Four hundred and fifteen thousand dollars for the Electronic Document Management System (EDMS) is in the Chief Information Officer's (CIO) capital monies to be set-aside for this Property Appraiser project.

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STATEMENT OF PROJECTION AND OUTLOOK

The Department projects to be within authorized budgeted expenditures and projects that available revenues will exceed expenses except as noted below:

Notes and Issues:

(Summarize any concern or exception, which will prohibit the Department from being within authorized budgeted expenditures and available revenues)

DEPARTMENT DIRECTOR REVIEW

The Department Director has reviewed this report in its entirety and agrees with all information presented including the statement of projection and outlook.

Signature

Department Director

Date _____